

DATE: August 24, 1999

TO: All California Academic, School, and Special Libraries

FROM: Tom Andersen
CLSA Program Coordinator
(916) 653-7391

SUBJ: **Expanded Pilot Multitype Interlibrary Loan Program**

You are invited to participate in the Library of California's interlibrary loan pilot program. Formerly open only to nonpublic libraries that have participated in the California Library Services Act (CLSA) interlibrary loan reimbursement program, this pilot program has been expanded to include all California libraries meeting the Library of California Interim Eligibility Standards, and incorporates the CLSA interlibrary loan reimbursement program for public libraries. See below for more information

What is the program?

The Library of California pilot multitype interlibrary loan program reimburses California academic, school, special, and public libraries for loans of material to other California libraries, provided the lending library does not charge any handling fees.

What is the duration of the program?

The Library of California Board has allocated funds for the expanded pilot program from September 1999 through June 2000. It is unknown at this time if the pilot program will be extended into the 2000/2001 fiscal year or if it will become a permanent access services program under the Library of California. The Board may also discontinue the program at any time.

What are the eligibility requirements?

To participate in the program, a library must meet the Library of California Interim Eligibility Standards and submit the Documentation of Interim Eligibility and Participation Authorization/Notification forms. The library must not charge handling fees for any claimed ILL transaction, and must submit a quarterly ILL Transaction Report/Claim to the State Library's Budget Office in order to be reimbursed. Public libraries and the CLSA nonpublic libraries that have already enrolled in the original Library of California ILL pilot program do not need to reapply.

What is the reimbursement?

Libraries are reimbursed \$2.85 – the current rate approved by the Department of Finance – for each interlibrary loan transaction; payments are quarterly. However, since the Library of California budget allocation may not be sufficient to cover the full cost of all transactions for the expanded pilot program, reimbursements will be prorated. 20% of the payment will be withheld from each valid claim, so that quarterly reimbursements will be made at 80% of the total cost. When costs are known for the entire year, a fifth payment will be made to reimburse participants at a higher percentage, providing funds remain in the budget. This process duplicates the method used to prorate CLSA ILL reimbursements to public libraries.

How do I report interlibrary loan transactions?

Submit an ILL Transaction Report/Claim each quarter to the State Library's Budget Office. The form should include all eligible interlibrary loan transactions to the four types of California libraries (public, academic, school, special) during the preceding quarter, and is due in the Budget Office **no later** than the 15th of the month following the reporting period.

You will need to fill in the following information for each report:

- 1) Library Name and Library Account Number. If you have never participated in the CLSA ILL reimbursement program or if you do not know your Library Account Number, please call Cindy Tackett at (916) 653-4192 or Sue Whitehead at (916) 653-4033 in the State Library's Budget Office. You will be assigned a Library Account Number which conforms to the numbering scheme in the Budget Office's accounting system.
- 2) Reporting Period - You should check off the quarter which is represented by the data that is being returned, e.g., January-March data is the third quarter (reporting is on a fiscal year basis)..
- 3) Make sure the form is signed; this is your legal claim for ILL reimbursement. **Please remember that if you are charging a handling fee, you are not entitled to claim the transaction.** Your signature acknowledges your understanding of this.
- 4) In the middle of the form you will notice three boxes under each category of loans. For those libraries who choose to track monthly data, there is one box for each month in the quarter. **Libraries are only required to fill in the total quarterly data section on the far right. _Monthly recording of data is a library option.**

Interlibrary loan pilot program eligibility guidelines are enclosed. If you have questions, please contact Tom Andersen, CLSA Program Coordinator, (916) 653-7391 (e-mail: tanderse@library.ca.gov) or Sandy Habbestad, CLSA Program Analyst, (916) 653-7532 (e-mail: shabbest@library.ca.gov).

How do I begin participating?

Review the Library of California Interim Eligibility Standards to make sure your library is eligible to participate. Download the Documentation of Interim Eligibility and Participation Authorization/Notification forms. Complete and sign (usually the Library Director is the appropriate administrative authority), make copies for your files, and mail the originals to:

Joyce Walker
California State Library
Library Development Services
P.O. Box 942837
Sacramento, CA 94237-0001

Each quarter submit an ILL Transaction Report/Claim by mail or fax to:

Budget Office
California State Library
P.O. Box 942837
Sacramento, CA 94237-0001

Fax: (916) 653-6272

The first quarter report will only include September ILL transactions.

There is no deadline for enrolling in the program.

A packet of the same ILL pilot program forms, instructions, and information that appear on the Library of California Web site may be requested directly from Joyce Walker at (916) 653-1441 or by sending an e-mail request to csllloc@library.ca.gov.

Questions?

Contact:

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